



READINESS ROUNDUP

December 16, 2005
Volume 1, Issue 3

Dedicated to preparing agencies & providers for the Enterprise Invoice Management/Enterprise Service Management service



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Have questions about EIM/ESM ?

Submit your questions to:
POS.EIM-ESM@massmail.state.ma.us

Welcome!

The implementation team continues to expand the number of agency and provider organizations engaged in the Enterprise Invoice Management and Enterprise Service Management service (EIM/ESM) roll-out. Most recently, we have begun working with the Department of Mental Retardation and the Department of Social Services. In addition, we continue to broaden our post-pilot deployment planning for the Department of Public Health.



Toward this end, two demonstrations of the EIM/ESM service were conducted this month within the Department of Public Health's Bureau of Substance Abuse Services and the Division of Community Health Promotion and Disease Prevention. Participants shared positive and encouraging feedback, such as:

- "I feel much better about why we are moving in this direction and how client security has been prioritized."
- "I really like the flexibility of the system and that we can have input into what would make our jobs easier."

Staff also found that the demonstrations helped them to anticipate better the changes EIM/ESM will bring. If you will be having a regional gathering with your organization, and would like a demonstration, submit a request to POS.EIM-ESM@massmail.state.ma.us.

Readiness Update



Pilot readiness activities are wrapping up for the Departments of Public Health and Mental Health.

Phase 1 usability testing for pilot organizations was completed in early December. This exercise included a limited set of functionalities of the EIM/ESM service. Also this month, **security role** assignments and **organization management** templates are being finished.

Upcoming activities for the Departments of Public Health and Mental Health will include **Phase 2 usability testing**, **pilot logistics** and

Day Zero Plan activities.

Phase 2 usability testing will include a complete set of functionalities. End users will use case scenarios to determine whether EIM/ESM is able to complete their fundamental business processes.

Pilot logistics—details of timing and staff support—are being reviewed and finalized.

The **Day Zero Plan** addresses how we will get Day Zero data, i.e., contracts, organizations, business data, past invoices etc. into ►►

(cont'd on p.2)



► EIM/ESM in order for the service to function correctly on Day 1 (the day we go live).

The Executive Office of Health and Human Services has developed manuals to help guide organizations (pilot and non-pilot) through the implementation process.

These manuals will serve as a step by step guide that will enable agency project managers to lead their agency and provider organizations with the assistance of an implementation team.

These manuals will be available electronically for future reference.



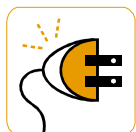
Training development for the new EIM/ESM service is fast approaching completion. Agency training staff will be the first to receive training; they in turn will train agency staff and providers during pilot. The sessions, known as Train-the-Trainer, are planned for just before pilot begins.

Soon thereafter, agency and provider staff will be trained on the EIM/ESM service. The length of training will vary depending upon the number of EIM/ESM activities a particular end user will need to complete. For persons with more limited roles, training may only require a few hours. For those who will use the EIM/ESM service more extensively, training may span several days.

Specific training schedules are being assembled, and will be communicated as soon as possible. All pilot training will be instructor-led, using a traditional classroom format. We look forward to getting pilot training underway and gathering participant feedback.

Focus on System Features

EIM System Feature—Claims



The Enterprise Invoice Management service manages the entire remittance process, including claim and invoice submission, adjudication, and remittance. **Claims** are featured in this issue.

What are claims?

A claim is a payment request that is submitted by a provider under an active unit rate or master service agreement contract. They are first tied to specific clients. Each claim can then be associated with one or more delivered services. Unit rate and master service agreements are essentially the same, but a master service agreement takes multiple provider organizations—who deliver the same service—and combines them onto a single contract for ease of contract management. Each provider organization is allocated a portion of the account in the form of a budget.

Screen Shot 1

How does EIM handle them?

EIM automatically completes many fields associated with claims, reducing data entry for provider staff. Service line information can be added when the claim is created, potentially saving provider staff time since it can be completed in one step instead of two or more. In addition, providers will be notified by EIM if they claim in excess of their contract's maximum obligation.

Group, or "batch" authorization enables a ►►

The screenshot displays a web-based interface for the EIM system. At the top, there's a navigation bar with tabs like 'Current Location', 'Billing', 'Claims', and 'Reports'. The main content area is titled 'Claim #1180' and is divided into several sections. The 'Claim Summary' section at the top shows the claim number and status. Below it, the 'Client Information' section displays details about the client, including their name and primary/secondary identifiers. The 'Contract' section shows the contract number and type. The 'Service Lines' section lists the services provided under the claim. At the bottom, the 'Claim Information' section contains fields for patient account number, total claim charge amount, facility code, and release of information code. Red circles and arrows are used to highlight and label these key sections.

Focus on System Features cont'd

EIM System Feature, cont'd

► provider supervisor to review and authorize multiple claims at one time. This feature may save considerable time. The current method is to authorize each claim manually.



After the claim has been submitted, EIM determines the appropriate payment amount, a process known as "adjudication." Agencies may review details and re-adjudicate if that extra control is desired.

After the claim is adjudicated, EIM will automatically generate a Payment Request for Commodity (PRC) on a schedule set by agencies. Agencies have the option of removing service lines prior to the PRC's submission to the Massachusetts Management Accounting and Reporting System (MMARS). The status of each claim payment may be checked by agency and provider staff at any time. It will alert them as to when they can expect payment, the amount, and the associated check number.

What is depicted in screen shot 1?

Shown on the previous page is a Claim Summary. It displays client specific, service line, contract, and claim information. In this example, a provider has searched for a client, selected the corresponding contract, and added a service line and associated information.

ESM System Feature-Consent Management



Enterprise Service Management handles all facets of client enrollment and service delivery. It will be utilized only by the Department Public Health for the pilot. This issue features **consent management**.

What is consent management?

Consent management controls access to confidential client information within ESM. There are two levels of consents. The first captures the client agreement to receive specific services; the second controls which agencies or other providers can view the service plan.

Why is it important?

Preserving the highest level of client privacy protection is critical. Consent management enable strict control over who can access client information.

When a user searches for client information, the only records retrieved are those for which the user's organization has consent. Authorized users can document and track consent forms in ESM, as depicted in screen shot 2. A hard copy of the signed consents must still be kept on file.

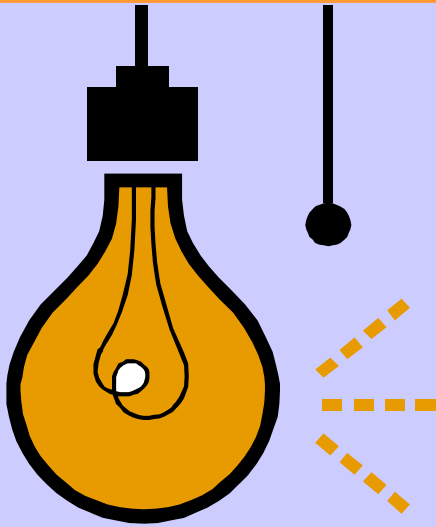
What is depicted in the screen shot 2?

Shown below is the Update Consent page, accessed from the Manage Client menu. A few authorized agency users can access this page to associate a service plan (a summary of a client's scheduled services) or add another organization link (giving another organization consent to view the client's information).

Screen Shot 2

The screenshot shows the 'Update Consent' page in the ESM system. At the top, there's a navigation bar with 'Update Consent' highlighted. The main heading is 'Client #12703 : Jane Doe'. Below this, the 'Update Consent' form has several fields: 'Consenting Person First Name' (Bob), 'Consenting Person Last Name' (Hill), 'Consenting Person' (Self), 'Consent Type' (Default/None), 'Effective From' (06/20/2005), and 'Effective To'. There's a 'Comments' field and a 'Date Created' field (09/09/2005 10:35:03). Below the form, there are three main sections: 'Associated Organizations' (with a table listing 'Boston Hospital' and 'Some Government Agency'), 'Associate Service Plan', and 'Add Organization Link'. Red circles highlight the 'Update Consent' button, the 'Associated Organizations' section, and the 'Associate Service Plan' and 'Add Organization Link' buttons. Arrows point from the bottom labels to these sections.

Updates and Reminders



Happy holidays! We look forward to continuing to meet with agency and provider staff to acquaint them with the EIM/ESM service. Recent venues include:

12/15 Vinfen Corporation

Look for these topics in next month's Readiness Roundup!

- Training update
- Payment Request for Commodity (EIM)
- Eligibility Determination and Client Enrollment (ESM)



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